

**EDI
EUROPEAN PERSPECTIVES**

**Peter Lines
Principal Consultant
INPUT**



EUROPEAN EDI MARKET

- 1986 Dollars 3M
- 1991 Dollars 175M
- AAGR 130 Percent



KEY EUROPEAN FACTORS

- International Trade
 - Standards
 - Harmonisation
 - Telecommunications Environment
-



EDI IN EUROPE

- **Initiatives**
- **Vendors**
- **Markets**



INPUT®

EDI INITIATIVES EUROPE



ODETTE

- **Fragmented National Development**
 - **60 Participants**
-



DISH

- Trials Q4 '86
- Extensions To:
 - Banks
 - Insurance
 - Importers



EEC CO-ORDINATED PROJECTS

- Cost 306
- CD Project
- Trade Facilitation



VENDOR ACTIVITY EUROPE



GEISCO

- **Motornet**
 - **Trade Express**
 - **EDI Express**
 - **VASP Agreements**
-

IBM

- BNS
- Joint Ventures:
 - Paribas



**McDONNELL DOUGLAS
BRITISH TELECOM**

- **Edinet Limited**
- **Complimentary Strengths**
- **Cross Industry Approach**



ICL/MERCURY

- **Tradanet**
 - **100 Users**
 - **Penetration Pricing Strategy**
 - **OSI Support**
-



ISTEL

- **Edict**
 - **80 Users**
- **UK Network**
- **Fixed Usage Pricing**



**SOFTWARE AND
PROFESSIONAL SERVICES**

- **Standards Evolution**
 - **Application Integration**
-



BUSINESS ENVIRONMENT

- **Reduced Opportunities for
Administrative Cost Saving**
 - **Increased Domestic and
International Competition**
 - **Need for Co-Operation**
-



UK EDI MARKET

- **1986 Dollars 2M**
- **1991 Dollars 75M**
- **AAGR 100 Percent**



UK MARKET

- Open Telecommunications Standards
 - XI Standards
 - Proactive Industry Associations
-



FRENCH MARKET

- **1986 Less than Dollars 1M**
 - **1991 Dollars 45M**
 - **AAGR 160 Percent**
-



FRENCH MARKET

- **Growth Phase 1988**
 - **Gradual Liberalisation**
 - **Low Levels of Awareness**
 - **Legal Constraints**
 - **Fragmented Industry Structures**
-



BENELUX

- **Highly Regulated Telecommunications Environment**
- **Clearinghouse Services Used by Companies in Retail Distribution Chain--IBM/GEISCO**



NORDIC COUNTRIES

- **High Labour Cost**
- **High Dependence International Trade**



WEST GERMAN MARKET

- **Dollars 35M by 1991**
 - **High Level of Awareness**
 - **PTT Monopoly**
 - **Implementation on Private and
PTT Networks**
-



ITALIAN MARKET

- Dollars 20M by 1991
 - Low Levels of Awareness
 - Least Mature Telecommunications Environment
 - No Current Vendor Involvement
-



KEY ISSUES

- **Standards**
 - **Networks**
 - **Software and Support**
-



ENVIRONMENTAL ISSUES

- Legal
- Security
- Organisational

